

The Friends Provident Foundation is an independent, endowed charity, created in 2001. We seek a fairer economy and a better society. We work toward this vision through grants, social investment, our mainstream investment and building our networks and communications.



Fairer economy, better world

GRANTS MANAGER

Salary £32,000 per annum (FTE)

3 - 4 days per week (flexible)

Based in central York

The Friends Provident Foundation is looking for an experienced Grants Manager to lead the grants function at the Foundation. We need an experienced grant-maker, people manager and systematic thinker to help us move our strategy forward. You will help assess proposals, review projects, take a lead in programme development as well as maintain close links with our partners.

You will need to have demonstrable grant assessment and management experience, excellent written and verbal skills and a real commitment to addressing fundamental social issues. Experience and understanding of the not for profit sector is essential. Knowledge and understanding of ethical issues relating to financial systems or the economy would be an advantage. Balancing the ability to work independently with effective team work will be key to success at the Foundation.

The post is based in York but the applicant would be expected to travel within the UK from time to time. The post is for 3-4 days per week, depending on applicant; flexible working arrangements are available.

We welcome applicants from all age groups and backgrounds.

If you would like to join the Foundation's grants team, a copy of the application pack can be obtained from our website

<https://www.friendsprovidentfoundation.org/about-us/vacancies/>

or by telephone on 01904 629675.

Applications should be made by 27 February 2017.

Interviews for short-listed candidates will be held on 8-9 March 2017 at the Foundation's offices in central York.



January 2017

Dear Colleague,

GRANTS MANAGER

Thank you for your interest in the role of Grants Manager of the Friends Provident Foundation. The Foundation is an independent charity established by a gift of £20 million from Friends Provident plc in 2004. In our short life, we have funded a number of exciting projects, are playing an active role in the philanthropic sector: in developing new thinking on economic resilience and in building the social investment market in the UK.

The role of Grants Manager is being filled after the departure of the previous incumbent after 9 years at the Foundation. He has left behind a legacy of excellent systems, well documented procedures and a strong ethos of partnership with our grant-holders. We hope to build on this.

Attached is a pack of information about the post that I hope will encourage you to apply:

- The advertisement for the job;
- Job Description;
- Person Specification;
- summary information about the Foundation.

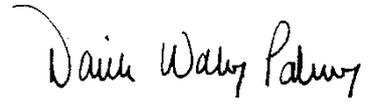
More information about us, including our most recent annual report and the projects we support can be found on our website – www.friendsprovidentfoundation.org . If you would like an informal discussion, please contact Danielle Walker Palmour, the Foundation Director (danielle.walker@friendsprovidentfoundation.org.uk) or 01904 629675.

To apply, please email your CV with a covering letter with full contact details setting out why this is the role for you and outlining your fit with the person specification by 12 noon **27 February 2017** to foundation.enquiries@friendsprovidentfoundation.org.uk. Please provide contact details for 2 referees who have good knowledge of your work.

We hope to hold the interviews during the weeks commencing either **8th or 9th February 2017**.

I hope this material is helpful and I look forward to hearing from you.

Sincerely,

A handwritten signature in black ink that reads "Danielle Walker Palmour". The signature is written in a cursive, flowing style.

Danielle Walker Palmour
Foundation Director

Job Description for Grants Manager of Friends Provident Foundation

The Grants Manager:

- A. Is responsible to the Director of the Foundation for the management and administration of grants and other non-grants support given to organisations within the strategic framework set by Trustees;
- B. Conducts assessments on individual proposals and leads on the development of the Foundation's overall proposal assessment processes;
- C. Is the line manager of the Grants and Social Investment Officer;
- D. Is responsible for maintaining an overview of the financial management of the Foundation's grant commitments;
- E. Supports the externally focused functions of the Foundation;
- F. Supports the Director in his/her role.

These are set out in more detail below -

Main duties of the Grants Manager:

A. Responsible for the management of grants and non-grant support

- To directly manage a part of the Foundation's portfolio of supported projects;
- To oversee the entire portfolio, working with colleagues directly managing projects, maintaining consistency in line with the Foundation's own terms and conditions of support, the wider legal framework and best practice principles within the sector;
- To work and liaise with the organisations supported by the Foundation, to assist them in achieving the goals shared with the Foundation and to develop their organisations;

- To convene and participate in programme and project advisory groups in relation to applications and grants under management, chairing as necessary;
- Quality assure external project outputs, and assist with dissemination activities, including hosting events if appropriate;
- To develop and maintain the Foundation's systems for proposal assessment and grant management, in line with current good practice and any relevant legislation, to an auditable standard;
- To be the main point of contact for the IT support for the Foundation's grant-making systems, including reporting faults, specifying requests for change and testing fixes and monitoring service level agreements;
- To report to the Director and Trustees on individual project progress on a quarterly basis.
- To report to the Trustees, periodically, on progress in achieving the Foundation's programme objectives, as requested by the Director.

B. Proposal assessment/proposal process

- To take the lead in liaising with applicants, potential applicants, supported organisations and providing feedback to unsuccessful applicants in support of the Foundation's programmes and objectives;
- To convene and maintain oversight of any programme advisors or other expert input into application assessment or programme evaluation;
- To assess and make judgements on individual proposals to the Foundation in line with the Foundation's grant-making policies and procedures;

- To prepare clear, concise and timely assessment reports on individual proposals for consideration by Trustees and to co-ordinate portfolio-level reporting;
- Take a lead on a sub-set of the Foundation's funding objectives, developing expertise on the topics involved, assessing all incoming proposals under that stream and managing any grants subsequently awarded.

C. Financial management

- To ensure the Foundation's financial and other resource commitments are communicated and deployed as determined by Trustees by constructing grant/ support offers and other contractual correspondence;
- To authorise grant-related and other payments in accordance with the Foundation's policies and procedures and within authorisation levels determined by Trustees;
- To liaise with the Foundation's Administrator, Director and other colleagues and accountancy services regularly on grant payments and maintenance of electronic and paper files and records;
- To report cumulative grant expenditure across the financial year to date and/or the whole programme.

D. Line management of Grants and Social Investment Officer

- To oversee the work of the Grants and Social Investment Officer, ensuring supervision, development and performance management;
- To maintain an oversight of the grants and other commitments managed by the Grants and Social Investment Officer, ensuring consistent approaches to assessment, grants management and communications.

E. Supporting external communications

Working with the Communications Manager and other colleagues to contribute to the achievement of the Foundation's Communications strategy objectives, including the on-line application process.

- To develop one-off and on-going external surveys of grant-holders and analyse the results;
- To maintain contacts and relationships with other relevant grant-making bodies, professional associations and key bodies in the public and voluntary sectors;
- To represent, and be an effective ambassador for, the Foundation externally;

F. Supporting the Director

- To play an active part in considering issues arising from the Foundation's work and commitments, including researching and write one-off papers for consideration by the Director and/or the Trustees;
- To contribute to the production of agenda papers for Trustees and to present oral reports at Trustee meetings as required;
- To give input to the preparation of statutory returns and the Foundation's annual report;
- To give input into the development of any new funding programmes, drawing on own grant-making expertise and any relevant subject knowledge;
- To apply Foundation policies as determined by charity law, employment law, Data Protection, equality of opportunity, good grant-making practice and the Foundation's commitment to transparency and fair dealing;
- To work as a key member of the Foundation's executive team, working flexibly and providing support and guidance to

colleagues.

- To take the opportunity to highlight relevant professional development activities and, with the Director's permission, to access them.
- To undertake tasks in furtherance of the Foundation's objectives, as requested by the Director or Trustees.

January 2017

Person Specification Grants Manager of Friends Provident Foundation

Experience:

Essential:

- at least 2 years in of autonomous project management (including finance and relationship management);
- at least 2 years experience of work in the voluntary sector;
- some experience of assessing proposals against criteria;
- Management of grant making or other relational databases;
- 2 years' experience of direct staff management.

Desirable:

- Grant management experience
- Research management experience
- Giving programme development
- Network development/ convening
- Salesforce in grant-making

Skills:

Essential:

- Critical thinking skills;
- Excellent written and verbal communication skills;
- Financial management skills (literacy, numeric);
- Highly developed administrative skills;
- ability to prioritise own work;
- Keyboard skills, database management and general computer literacy;
- Excellent inter-personal skills

Desirable:

- Ability to write for a broader audience

Knowledge/ expertise:

Essential:

- Critical appraisal of new ideas, projects and approaches using a variety of methods including financial, text and research;
- Understanding of civil society
- Grant-making policies and practices, including ICT.

Desirable:

- Practical knowledge of the financial system, social enterprises and structures in the UK or internationally

Desirable:

- Practical knowledge of financial systems, economic policy and structures in the UK or internationally;

Personal attributes:

Essential:

- Team working;
- Sympathy with the stated aims and ethos of the Foundation;
- Ability to work independently and on own initiative;
- Ability to think creatively;
- Flexibility of working practices;
- Ability to travel within the UK on occasion.

This post will be based in York.

January 2017

Friends Provident Foundation

Giving programme 2013–18



Friends Provident Foundation is an independent grant-making charity working to support greater economic resilience through building knowledge and taking action at the strategic and local levels. We are particularly interested in supporting the development of economic and financial systems that are designed to include those who are most vulnerable to market failure.



Building Resilient Economies

Friends Provident Foundation's main grant-giving and investment programme, Building Resilient Economies, was launched in 2013. Our aim is to build a more resilient economic system – one that distributes **social and economic goods and services** more fairly, and balances short-term and long-term needs more effectively.

The Foundation is working on two levels:

1. **Systems change** – We aim to support disruptive innovation that will actually change the current financial system. We want to explore and inform changes and innovation in regulation, policy and ways of working that will contribute to a more resilient economic system.

Systems change will require strong **analysis** from a range of perspectives. We wish to support work that can help to transform corporate behaviour, and to stimulate **feasible new ideas** and scaleable, practical examples.

2. **Building local economic resilience** – Our work at the local level will focus on testing and reviewing local or small-scale initiatives that build economic resilience through **diversity, flexibility** and **building capabilities**.

We wish to see the development of local economic resilience. We seek to support projects that share learning about effective ways for communities to create more sustainable economic systems and retain more of their value. This might include creating **community assets** or new approaches to **local finance**.

We seek to build **partnerships** with other organisations that are also funding work at the local level, to learn from and share learning between local initiatives.

The Right Use of Money

How can **financial systems** create and sustain **social harmony**, and at the same time deliver economic goods and services? This **question** forms the basis of the Foundation's work, and reflects ground-breaking work to develop ethical funds carried out by our original donor, Friends Provident, over 30 years ago.

The Foundation continues to explore these issues through its main grant-making programme as well as supporting a small number of projects to explore aspects of the ethics of the financial systems that underpin our society.



How the Foundation plans to reach its goals

The Foundation is working in three ways:

1. Encouraging thinking about how economic resilience might be enhanced.
2. Supporting practical projects to build economic resilience at the local and systemic levels, balancing social and economic benefits, alleviating disharmony and addressing inequality.
3. Using our assets, including financial and human capital, to pioneer new ways of thinking about how money is used to solve social problems.

Trustees will consider applications for grants, loans, underwriting or other forms of financial support. The Foundation has a developed social investment policy and we will consider proposals for investment that fit with our programme aims.

For more information go to our website at **www.friendsprovidentfoundation.org**

About Friends Provident Foundation

Friends Provident Foundation is a grant-making charity controlled by its Trustees and independent of its original donor, the Friends Provident group of companies. The Foundation was established in 2001 as part of the demutualisation of Friends Provident Life Office and the public listing of the company. It was endowed with unclaimed shares for the purpose of pursuing general charitable objectives.

The Foundation provides grants and social investment in support of its objectives as well as actively engaging in policy and practice initiatives to bring about change in its fields of interest. The Foundation disseminates its findings widely through meetings and seminars with policy makers and practitioners, media work, publications and the Internet.



**FRIENDS
PROVIDENT
Foundation**

For more information about our work go to
www.friendsprovidentfoundation.org

REGISTERED CHARITY NO. 1087053